

# Bootcamp session 3: Customizing workflows



## Come prepared

- Understand the **fundamentals of tasks, pipelines, and jobs**
- Familiarize yourself with the basics of how **automations and stages** work
- Make a list of the **recurring tasks** you'd like to automate
- Explore the **basic calendar view** to manage your workflows effectively, ensuring you make the most of TaxDome's features
- Familiarize yourself with the **template library**

## Session recap

- Dive into **the basics of managing tasks** and see **how you can use tasks in workflow pipelines**
- Explore how to **view, search, filter, print, and export jobs**
- Create your **first pipeline with automations in five simple steps**
- Create **dependencies and make jobs move automatically from stage to stage** in a pipeline

## How to find templates

- Pipelines containing all relevant templates can be found in the TaxDome template library. Look for “Bootcamp 2024 - Tax Prep” or “Bootcamp 2024 - Client onboarding”
- You can find more information about the TaxDome template library **here**
- Check out popular templates in the library and **incorporate them into your practice**